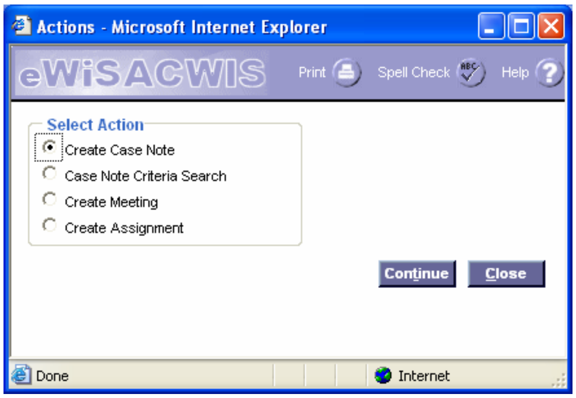
# CREATING AND REVIEWING CASE NOTES

## CREATING A CASE NOTE FOR A CASE TO WHICH YOU HAVE AN ASSIGNMENT

1. Click on the Cases Expando to view all cases to which you have an assignment. Scroll to the case in which you would like to create a case note. Click on the Actions hyperlink next to the case name. This will open the Actions Window.

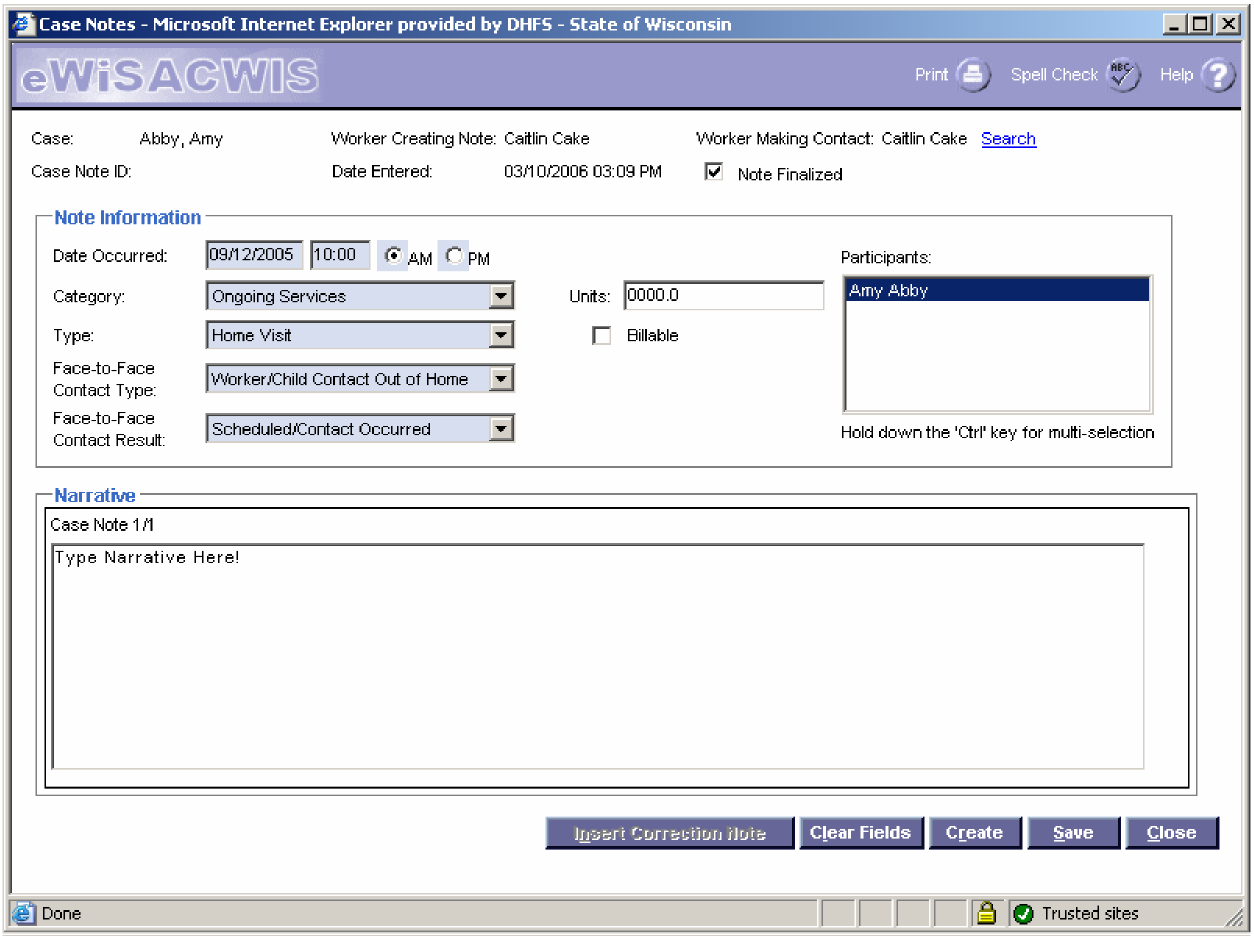
2. Click on the Create Case Note radio button. Click on Continue. This opens the Case Note window




3. At the top of the page are the ‘Worker Creating Note’ and ‘Worker Making Contact’ fields. There is a search link adjacent to the ‘Worker Making Contact’ field, which the worker creating the note can click to search the name of the worker who actually made contact with the participant(s). The worker name appearing on the case outliner will display as the name of the ‘Worker Making Contact’.

   **The Note Finalized check box will freeze the note once the box is checked. If the box is not checked, the note remains editable by the worker creating the note for 30 days after creation. Upon the 30th day, the note will automatically freeze.**

   In the Note Information group box, enter the appropriate date and time. Select the participants for the case note. This will attach the note to the participant’s record in addition to the case file. Select the Category, Type, Face-to-Face Contact Type and Face-to-Face Contact Result. Enter text of the note in the narrative section.




4. When completed with the Narrative section, click on Spell Check at the top of the window to Spell Check your work. When finished with Spell Check, click on the save button.

5. Click on the Close button to return to the outliner.

## CREATING A CASE NOTE FOR WHICH YOU DO NOT HAVE AN ASSIGNMENT

Open the Search window and search out the case in which you want to create a case note.

Select the Actions hyperlink next to the case name. This will open the Actions window. Click on the Create Case Note radio button. Click on the Continue button. This will open the Case Note window.

1. Enter the appropriate date and time. Select the participants for the case note. Select the Category, Type, Face-to-Face Contact Type and Face-to-Face Contact Result. Enter text of the note in the narrative section.

   **The Note Finalized check box will freeze the note once the box is checked. If the box is not checked, the note remains editable by the worker creating the note for 30 days after creation. Upon the 30th day, the note will automatically freeze.**

2. When completed with the Narrative section, click on Spell Check at the top of the window to Spell Check your work. When finished with Spell Check, click on the save button.

3. Click on the Close button to return to the outliner.

## REVIEWING NOTES

1. Click on the Cases expando to view cases. Click on the case in which you want to review notes.

2. Expand the case to view the Narrative Icon. Click on the Narrative Icon to view all notes in the case.

3. Click on the hyperlink for the note that you would like to review.

**Note:** If you do not have an assignment to the case, search out the case from the search window, and expand the case to see all the icons. All notes for the case will be under the Narrative Icon. Notes regarding contacts in the Initial Assessment are contained in under the Assessment Icon.